



Lobbyist Financial Disclosure Report

(Utah Code Section 36-11-201) Effective May 24, 2002

This report must be filed by each lobbyist, principal, or government officer who makes expenditures totaling \$50 or more on public officials or members of their immediate families in reporting period.

A YEAR-END REPORT IS REQUIRED FOR ALL LOBBYISTS

Name of Lobbyist, Principal or Government Officer

Street Address

Suite/Apt Number

City

State

Zip Code

Area Code and Phone Number

Area Code and Fax Number

Type of Report

(Check the appropriate box)

YEAR-END REPORT: ALL LOBBYISTS MUST FILE

☐

January 10 (includes all expenditures made during the calendar year. If no expenditures have been made, a report must be submitted stating the amount of expenditures as "none.")

SUPPLEMENTAL REPORTS

☐

10 days after the last day of each annual general session (Includes all expenditures made from January 1 through the last day of the annual general session.)

☐

7 days before a General Election (Includes all expenditures made since the last reporting period)

☐

7 days after the end of a special session or veto override session (Includes all expenditures made since the last reporting period.)

Is this report an amendment?
Yes____ No____

Report Verification

I, _____

(print name)

affirm that this report is true, accurate and complete to the best of my knowledge.

Signature

To File this Form

Mail or deliver to

Office of the Lieutenant Governor, Elections Division

115 State Capitol

Salt Lake City, UT 84111

Fax (801) 538-1133

For More Information

Contact the Elections Office

(801) 538-1041

1-800-995-VOTE (8683)

elections@utah.gov

For Office Use Only

____ Entered

____ Copied

Report Filed

____ M

____ F

____ HD

____ PM

Date Received

“Public Official Type” Key

In accordance with Utah Code §36-11-201, lobbyist financial reports must disclose expenditures made to benefit public officials **by public official type**. For reporting purposes, the following letters, **L, E, AL and AE**, may be used to indicate public official type on this disclosure.

L - A member of the Legislature

E - An individual elected to a position in the executive branch

AL - An individual appointed to or employed in a position in the legislative branch who:

- (i) occupies a policymaking position or makes purchasing or contracting decisions
- (ii) drafts legislation or makes rules
- (iii) determines rates or fees; or
- (iv) makes adjudicative decisions

AE - An individual appointed to or employed in a position in the executive branch who:

- (i) occupies a policymaking position or makes purchasing or contracting decisions
- (ii) drafts legislation or makes rules
- (iii) determines rates or fees; or
- (iv) makes adjudicative decisions

Information required by 36-11-201(1)(b)

Attach additional pages if needed

Name of each public official that was employed by the lobbyist, principal, or government officer or who performed work as an independent contractor for the lobbyist, principal, or government officer during the last year, including the nature of the employment or contract:

Number of each bill or resolution and short title on behalf of which the lobbyist, principal, or government officer made an expenditure to a public official for which a report is required:

A description of each executive action on behalf of which the lobbyist, principal, or government officer made an expenditure to a public official for which a report is required:

General purposes, interests, and nature of the organization or organizations that the lobbyist, principal, or government officer filing this report represents:

Summary Page

(Complete this page after filling out Schedules A, B, C, D and E)

Travel Expenditures this Period

(See Schedule A)

L		See Schedule A Line 1
E		See Schedule A Line 2
AL		See Schedule A Line 3
AE		See Schedule A Line 4
Total		

Travel Expenditures Year-to-date

(See Totals from all Schedule A Reports Filed this Year)

		L
		E
		AL
		AE
Total		

Other Expenditures this Period

(See Schedules B, C, D and E)

L		Add together line 1 totals from Schedules B, C, D and E
E		Add together line 2 totals from Schedules B, C, D and E
AL		Add together line 3 totals from Schedules B, C, D and E
AE		Add together line 4 totals from Schedules B, C, D and E
Total		

Combine totals from this period

**Total Expenditures
This Period**

Other Expenditures Year-to-date

(See totals from all Schedule B, C, D and E Reports filed this year)

		L
		E
		AL
		AE
Total		

Combine year-to-date totals

**Year-to-date
Expenditures**

Schedule A

Travel Expenditures

PLEASE NOTE: Only travel expenditures made to benefit public officials should be included in this report. Do not report your personal travel expenditures. Itemize expenditures for food, lodging, gifts, and side trips in the "Itemized Expenditure" column.

Attach additional pages if needed

Public Official Type*	Date Received	Destination/Purpose	Names of Individuals taking trip	Sponsoring Organization	Itemized Expenditure

Total Travel Expenditures by Public Official Type

Public Official Type*	Total Travel Expenditures
L	
E	
AL	
AE	
All Public Official Types	

This line is designated "**Line 1**" for the purpose of completing the Summary Page

Line 2

Line 3

Line 4

Line 5

*Use L, E, AL or AE as defined on page 1 of this report

Schedule B

Itemized Expenditures **NOT** Exceeding \$50 per Person

Attach additional pages if needed

Public Official Type*	Date of Expenditure	Purpose	Amount of Expenditure

Total Expenditures Not Exceeding \$50 by Public Official Type

Public Official Type*	Total Expenditures
L	
E	
AL	
AE	
All Public Official Types	

This line is designated "**Line 1**" for the purpose of completing the Summary Page

Line 2

Line 3

Line 4

Line 5

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Schedule C

Itemized Expenditures Exceeding \$50 per Person

PLEASE NOTE: Under "Person(s) Benefitted" list the public official(s) or member(s) of their immediate families who attended the event or activity or received the benefit of the expenditure. "Immediate Family" is defined in the Utah Code as a spouse, a child residing in the household or an individual claimed as a dependent for tax purposes.

Attach additional pages if needed

Public Official Type*	Date of Expenditure	Location	Purpose	Person(s) Benefitted	Total Expenditure

Total Expenditures Exceeding \$50 by Public Official Type

Public Official Type*	Total Expenditures
L	
E	
AL	
AE	
All Public Official Types	

This line is designated "**Line 1**" for the purpose of completing the Summary Page

Line 2

Line 3

Line 4

Line 5

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Schedule D

Lobbyist Group Expenditures

This section is for expenditures made by two or more lobbyists, principals, government officers, or any combination of lobbyists, principals, and officers who each contribute a portion of an expenditure made to benefit a public official or member of his immediate family when the total aggregate expenditure exceeds \$50.

Attach additional pages if needed

Public Official Type*	Date	Location	Purpose	Person(s) Benefitted (Provide Public Official name if total expenditure conferred by the group exceeds \$50)	Total expenditure conferred by group	Total expenditure conferred by lobbyist filing this report

Total Lobbyist Group Expenditures by Public Official Type

Only Expenditures conferred by the individual lobbyist should be reported in the section below.
Do not include the total expenditure conferred by the group.

Public Official Type*	Total Expenditures
L	
E	
AL	
AE	
All Public Official Types	

This line is designated "Line 1" for the purpose of completing the Summary Page

Line 2

Line 3

Line 4

Line 5

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Schedule E

Multi-client Lobbyist Expenditures

Only expenditures conferred by the **individual lobbyist** should be reported in the section below.
Do not include the total expenditure conferred by the group.

Attach additional pages if needed

Public Official Type*	Date	Location	Purpose	Person(s) Benefitted (Provide Public Official name if total expenditure conferred by the group exceeds \$50)	Total expenditure conferred by group	Total expenditure conferred by lobbyist filing this report

Total Multi-client Lobbyist Expenditures by Public Official Type

Only Expenditures conferred by the **individual lobbyist** should be reported in the section below.
Do not include the total expenditure conferred by the group.

Public Official Type*	Total Expenditures
L	
E	
AL	
AE	
All Public Official Types	

This line is designated "**Line 1**" for the purpose of completing the Summary Page

Line 2

Line 3

Line 4

Line 5

*Use L, E, AL or AE as defined on page 1 of this report